

Montana Insurance Continuing Education Advisory Council meeting - November 20, 2019

Transaction Number	Transaction Date	Provider Name	Course Name	Course Group	Credits	Course Summary
2593838712	9/23/2019	CEU Institute, Inc.	Alternative Dispute Resolution/Mediation (1hr)	Adjuster	General: 1	The course addresses management. Discusses mediation and arbitration requirements in disputed Louisiana insurance claims, voluntary versus directed mediation, arbitration procedures, Montana lack of arbitration or mediation under the Montana Rules of Civil Procedure.
1777428256	10/11/2019	ExamFX, Inc.	Front Line Fraud Prevention	Ethics	Ethics: 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by Kansas. Discusses fraud schemes and scams, fraud prevention, regulations, red flags, and the producer role.

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4097563189	10/11/2019	Hudson Insurance Company	2020 Spring Agent Update Training	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Kansas. Discusses 2020 federal crop insurance program updates, actuarial changes, policies, endorsements, policy provisions, assigned yields, specialty crops, and pasture, rangeland, forage and apiculture.
4097563189	10/11/2019	Hudson Insurance Company	Whole Farm Revenue Protection-2020 and Succeeding Years	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Kansas. Discusses the whole-farm insurance product, qualifying person criteria, insurance eligibility, beginning versus veteran farm and ranch coverage, changes for 2020, terms, special circumstances, and the application process.

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1947557969	10/13/2019	ACUITY, a Mutual Insurance Company	CLASSROOM JOURNEY INTO PL CYBERLAND	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Wisconsin. Discusses identity fraud, data recovery, system restoration, cyber extortion, phishing, electronic theft and wire fraud.
626213094	10/15/2019	Protective Life Insurance Company	Medicare Made Easy - Myths, Mistakes and Opportunities	Life	General: 1	The course addresses product knowledge of social insurance. Discusses retirement health needs, Medicare program requirements, interaction between Social Security and Medicare, benefit planning, understanding Medicare, benefit costs and long-term coverages.

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428699745	10/16/2019	Rain and Hail Insurance Service, Inc.	2020 MPCl Spring Agent Training	Property & Casualty	General: 5	NAIC Uniform submission, 5 classroom credit hours approved by Washington. Discusses federal requirements, spring crop actuarial updates, policy provisions, handbook changes, claims, whole farm revenue protection and underwriting.
1113267054	10/16/2019	CEU Institute, Inc.	The Gavel National Conference IV	Adjuster	General: 12	The course addresses product knowledge of property and casualty insurance. Discusses conference topics in five general sessions and five sessions with six concurrent offerings each, addressing coverages, risk management, mediation, accident investigation, claim litigation, distracted driving claims, defense preparation techniques, personnel claims, cyber liability, federal and state regulations and claim settlement.

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3486662852	10/16/2019	Crop Risk Services, formerly ADM Crop Risk Services, Inc.	2020 Ethics Program	Ethics	Ethics: 1	NAIC Uniform submission, 1 ethics classroom credit hour approved by Illinois. Discusses business ethics, trade practices, fiduciary responsibilities, ethical dilemmas, and promoting ethical behavior.
3486662852	10/16/2019	Crop Risk Services, formerly ADM Crop Risk Services, Inc.	2020 Spring Update	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Illinois. Discusses federal program standards, actuarial changes, general standards handbook updates, claims updates, unit structures, production reporting underwriting and crop plans and policies.

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83342209	10/19/2019	Bison Mountain Financial	Strategies for Maximizing Social Security Retirement	Life	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Arizona. Discusses Social Security retirement benefits, full retirement age, benefits for non-working spouses, eligibility, maximizing survivor benefits, and Social Security taxation.
83342209	10/19/2019	Bison Mountain Financial	Smart Home Liability and Cyber Coverage for Construction	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Arizona. Discusses smart-home liability, cyber liability, smart device breach, e-crime loss, first-party losses, liability policy forms that cover elements of cyber risk and available coverages.

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4040576418	10/21/2019	CEU Institute, Inc.	Alternative Dispute Resolution / Mediation (1hr) Webinar	Adjuster	General: 1	The course addresses management. Discusses mediation and arbitration requirements in disputed Louisiana insurance claims, voluntary versus directed mediation, arbitration procedures, Montana lack of arbitration or mediation under the Montana Rules of Civil Procedure.
25508874	10/22/2019	Transamerica Occidental Life Insurance	Estate Planning Considerations for Foreign Nationals	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses estate planning, qualified domestic trusts, using life insurance to fund death benefit taxes, and unique concerns when estate planning for resident aliens.

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44581632	10/23/2019	Mountain West Farm Bureau Mutual Insurance Company	2019 Federation Mtgs - Commercial Insurance	Property & Casualty	General: 1	The course addresses product knowledge of property insurance. Discusses commercial property coverage, exclusions, limitations, covered locations, commercial endorsements, selecting limits, additional insureds and other forms.
455824667	10/23/2019	Mountain West Farm Bureau Mutual Insurance Company	2019 Federation Mtgs - Indexed Universal Life	Life	General: 1	The course addresses product knowledge of life insurance. Discusses universal versus indexed universal life, comparing indexed universal life to other retirement options, and benefits.

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455824667	10/23/2019	Mountain West Farm Bureau Mutual Insurance Company	2019 Federation Mtgs - Flexible Premium Annuities	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses single premium versus flexible premiums, immediate versus deferred payout annuities, fixed and variable annuities, and annuity features.
2132011807	10/23/2019	Hartford Fire Insurance Company	HSI Commercial Lines Training Program	Property & Casualty	General: 31	NAIC Uniform submission, 31 classroom credit hours approved by Connecticut. Discusses commercial property and auto insurance, general liability and employment practices liability, business income, and workers' compensation insurance.

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3644088468	10/23/2019	RegEd, Inc.	Fraud in Auto Insurance Claims	Property & Casualty	General: 5	NAIC Uniform submission, 5 computer-based, self study credit hours approved by North Carolina. Discusses fraudulent application and claim costs, suspicious claims, inconsistencies, auto theft investigation, personnel injury protection, personal auto versus commercial auto policies, and mandatory fraud reporting.
3915507791	10/23/2019	Mountain West Farm Bureau Mutual Insurance Company	2019 Federation Mtgs - Farm and Ranch	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses farm and ranch property coverage and forms, liability coverage, types of dwellings, outbuildings, underwriting, and claim examples.

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742421388	10/24/2019	National Association of Health Underwriters	Single-Payer Healthcare Certification	Disability General: (Health) 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by Illinois. Discusses private purchase health insurance, multi-payer versus single payer plans, plan administration, additional voluntary and supplemental coverage, single payer plans in other countries, and social insurance programs.
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2902235070	10/24/2019	ClieTell CE	The Agent's Guide to Life Insurance	Life	General: 7	NAIC Uniform submission, 7 computer-based, self study credit hours approved by California. Discusses benefits of and uses for life insurance and annuities, elements of a policy or contract, types of life insurance contracts, benefits and disadvantages of policy types, processing a policy and elements of life insurance trusts.
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3478062110	10/24/2019	Quest Continuing Education Solutions	Homeowners Valuation Insurance Training	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses concepts of property valuation, replacement value, catastrophes and replacement cost, windstorm and hail endorsements, wildfire mitigation and forms of coverage.
1609651713	10/25/2019	CE University- ceu.com	Annuities, Retirement Planning, & Suitability - 4 Hour	Annuity Suitability	General: 4	NAIC Uniform submission, 4 computer-based, self study credit hours approved by Pennsylvania. Discusses annuities, guaranty association, annuity contract uses and benefits, types of annuity contracts, qualified versus non-qualified annuity contracts, annuity features, annuity taxation, policy replacement and suitability.

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2245178337	10/25/2019	Hudson Insurance Company	2020 Spring Agent Update Training - webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Kansas. Discusses 2020 federal crop insurance program updates, actuarial changes, policies, endorsements, policy provisions, assigned yields, specialty crops, and pasture, rangeland, forage and apiculture.
2245178337	10/25/2019	Hudson Insurance Company	2020 Adjuster Training School	Adjuster	General: 16	The course addresses product knowledge of property and casualty insurance. Discusses policies for specialty orchard crops, (plant) nursery policy, endorsements, appraisals and loss adjustment, fresh markets and other specialty crops, whole farm revenue protection policy, and loss adjustment standards.

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2245178337	10/25/2019	Hudson Insurance Company	Ethics-2020 and Succeeding Years	Ethics	Ethics: 3	NAIC Uniform submission, 3 ethics classroom credit hours approved by Kansas. Discusses ethical behavior, ethics versus values, ethical decisions, workplace ethics, ethical leadership, producer ethical responsibilities, controlled business rebating, and conflicts of interest.
3037611049	10/26/2019	CAPE School (Commonwealth Academy of Professional Education)	Taming Underwriting Requirements with Technology - Tele	Property & Casualty	General: 4	NAIC Uniform submission, 4 teleconference credit hours approved by Virginia. Discusses insurance policy underwriting basics, the underwriting process, automated underwriting, data analysis, insurance contracts with specialized underwriting requirements and fraud.

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3902683297	10/26/2019	CAPE School (Commonwealth Academy of Professional Education)	Terrorism Risk Insurance: Mitigating Vulnerability - Tele	Property & Casualty	General: 4	NAIC Uniform submission, 4 teleconference credit hours approved by Virginia. Discusses terrorism vulnerabilities, insurability of the terrorism risk, coverages and exclusions, the Terrorism Risk Insurance Act, risk management and transfer, vulnerability assessment and two case studies.
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3957930747	10/26/2019	CAPE School (Commonwealth Academy of Professional Education)	Responsible Protection: Umbrella Liability - Tele	Property & Casualty	General: 4	NAIC Uniform submission, 4 teleconference credit hours approved by Virginia. Discusses excess versus umbrella policy, excess policy versus other insurance clauses, personal lines and commercial lines umbrella, considerations for homeowners and auto coverage, coverage amounts, liability exposures, interactions between primary and excess insurers and two case studies.
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3957930747	10/26/2019	CAPE School (Commonwealth Academy of Professional Education)	Legal Conflict Resolution - Tele	Property & Casualty	General: 4	NAIC Uniform submission, 4 teleconference credit hours approved by Virginia. Discusses resolving legal conflicts, comparing alternatives, insurance dispute resolution, rules of procedure, and three case studies.
3957930747	10/26/2019	CAPE School (Commonwealth Academy of Professional Education)	Integrated Insurance Ethics: Resolving Ethical Dilemmas - Tele	Ethics	Ethics: 4	NAIC Uniform submission, 4 ethics teleconference credit hours approved by Virginia. Discusses ethics versus law, ethical missions and goals, normative ethics, insurance ethical dilemmas, integrated business ethics, and seven case studies.

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3957930747	10/26/2019	CAPE School (Commonwealth Academy of Professional Education)	Applying Ethical Principles to Your Insurance Business - Tele	Ethics	Ethics: 4	NAIC Uniform submission, 4 ethics teleconference credit hours approved by Virginia. Discusses ethical philosophy, defining ethics and implementing ethical behaviors, theories of ethics, business ethics and the ethical social contract, purpose versus profit, and ethical dilemmas.
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4239296325	10/26/2019	CAPE School (Commonwealth Academy of Professional Education)	Voluntary Benefits: Complement Core Offerings - Tele	Life	General: 4	NAIC Uniform submission, 4 teleconference credit hours approved by Virginia. Discusses insurance benefits offered outside the employer group plan, benefits and limitations, employer versus employee paid premium, specific illness coverage, disability income plans, hospital indemnity, life insurance, accident plans, vision and dental plans, benefits, exclusions and one case study.
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4239296325	10/26/2019	CAPE School (Commonwealth Academy of Professional Education)	Understanding the Dynamic Health Insurance Market - Tele	Disability General: (Health) 4	NAIC Uniform submission, 4 teleconference credit hours approved by Virginia. Discusses employer group health plans, the effect of employer size on plan characteristics, high deductible plans, flexible savings plan eligibility, individual health plans, group versus individual plan coverages, and association health plans.
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2668982572	10/30/2019	United Insurance Educators, Inc.	UIECE 2019 Montana General Code Changes (Self-Study)	MT Legislative Changes	MT Legislative Changes: 2	The course addresses insurance law. Discusses commissioner conflicts of interest, service of process, appointment of a registered agent, interest rate for fraud restitution, actions for unauthorized insurers, disability income insurance as a surplus line, health service corporation fee, and changes in benevolent association entities.
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2668982572	10/30/2019	United Insurance Educators, Inc.	UIECE 2019 Montana General Code Changes (CBT)	MT Legislative Changes	MT Legislative Changes: 2	The course addresses insurance law. Discusses commissioner conflicts of interest, service of process, appointment of a registered agent, interest rate for fraud restitution, actions for unauthorized insurers, disability income insurance as a surplus line, health service corporation fee, and changes in benevolent association entities.
3526551658	10/30/2019	National Association of Public Insurance Adjusters	2019 NAPIA Mid-Year Meeting	Adjuster	General: 6	NAIC Uniform submission, 6 classroom credit hours approved by Virginia. Discusses public adjuster referral practices, the property and casualty market, mold and fungus in adjusting, trials and cross examination, coverage and claims.

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2633418417	10/31/2019	Rural Community Insurance Company	2020 Agent Federal Crop Spring CE Meeting	Property & Casualty	General: 5	The course addresses product knowledge of property and casualty insurance. Discusses 2020 federal program changes, actuarial updates, general standards handbook, program compliance, and actual production history.
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340496756	11/1/2019	Professional Insurance Agents (PIA) of Montana	Exposures That Prove Why ALL Employers Need EPL Coverage	Property & Casualty	General: 3	The course addresses product knowledge of casualty insurance. Discusses employment practices liability claims, workplace torts, employer exposures and policy coverages, incident reporting, constructive discharge, and punitive damages.
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653493109	11/1/2019	Professional Insurance Agents (PIA) of Montana	Additional Insureds & Certificates: Issues, Answers and When to Say “No”	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses certificates of insurance and certificate holders, evidence of insurance, additional insured endorsements, construction risks, blanket additional insureds, certificate language and waiver of subrogation.
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1551516907	11/1/2019	Professional Insurance Agents (PIA) of Montana	Dead or Alive: The Many Functions of Life Insurance	Life	General: 3	The course addresses product knowledge of life insurance. Discusses term versus permanent life, types of term life insurance, types of permanent life insurance, beneficiaries, living benefits, death benefit and conditional receipt.
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3335884128	11/1/2019	Professional Insurance Agents (PIA) of Montana	Flood Insurance and the NFIP	Property & Casualty	General: 3	The course addresses product knowledge of property insurance. Discusses the Federal Emergency Management Agency flood program, program definitions, flood zones and maps, the general property policy, covered and uncovered damages and expenses, coverage limits, the claim process, and the Flood Reform Act of 2004.
3402701987	11/1/2019	Professional Insurance Agents (PIA) of Montana	Construction Contracts: What the Agent Should Know, Do and NOT Do	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses contract elements, agreement types, hold harmless versus indemnification agreements, commercial general liability contract, additional insureds, blanket endorsements and coverage triggers, subrogation waiver, builders risk and installation floater language.

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3501645420	11/1/2019	Professional Insurance Agents (PIA) of Montana	Coverage Problems Your Contractors Hate (and How to Solve Them)	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses inland marine coverage, builders' risk coverage, installation floaters and contractors' equipment policies.
3925250163	11/1/2019	Professional Insurance Agents (PIA) of Montana	Adventures in Aging: Understanding Social Security & Medicare	Property & Casualty	General: 3	The course addresses social insurance. Discusses social Security and Medicare retirement benefits, eligibility and applying for benefits, cost, benefits and penalties, Medigap coverage, Parts C and D, Medicare Advantage, provider networks and planning elements.

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113287005	11/4/2019	Old Republic National Title Insurance Company - Rocky Mountain	SSU - Taxes and Title Insurance	Title	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Utah. Discusses 1099 - S and title responsibilities, reporting, federal tax liens, Section 1031 exchanges, excluded property, qualifying properties, delayed exchange, three- property and 200% rules of identification.
1736479355	11/4/2019	Bureau of Business and Economic Research	2020 Economic Outlook Seminar	Life	General: 2	The course addresses management. Discusses the economic effect of recreation, agriculture, real estate, forestry, technology, housing and other industries on Montana businesses.

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4217939130	11/4/2019	Prudential Annuities Life Assurance Corporation	Introduction to Statutory Paid Leave Programs	Life	General: 2	The course addresses product knowledge of disability insurance and management. Discusses the Family Medical Leave Act, short-term disability plans, coverage options, private versus public plans and statutory family leave.
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3079398333	11/5/2019	Land Title Institute	ALTA and MBA Digital Boot Camp	Title	General: 6	The course addresses product knowledge of title insurance. Discusses digital closings, the process, roles and responsibilities, regulation, title and lending practices, e-signing rules and pre-opened loans and the effect on closing.
739819674	11/6/2019	Quest Continuing Education Solutions	Personal Lines	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses personal insurance policy elements, types of coverage, home owner's and renter's insurance, other types of personal lines and policies.

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2081771493	11/6/2019	Allianz Life Financial Services LLC	Split Dollar	Life	General: 1	The course addresses product knowledge of life insurance. Discusses split dollar life insurance, benefits of split dollar arrangements, endorsements, collateral assignments, and examples.
3686816834	11/6/2019	Stewart Title Guaranty - Missoula Office	2019 - A YEAR IN REVIEW	Title	General: 1	The course addresses product knowledge of title insurance. Discusses federal legislation during 2019, US Supreme Court cases decided during 2019 that affect title insurance and federal and state regulatory matters.

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542940990	11/7/2019	American Institute for CPCU (formerly AICPCU/Insuran ce Institute of America)	CPCU 530 - Business Law for Insurance Professionals	Property & Casualty	General: 21	NAIC Uniform submission, 21 text- based, self study credit hours approved by Pennsylvania. Discusses U.S. law and legally binding contracts, commercial and property law, tort and agency law, employment law, business entity types, and the types and content of insurance contracts affected by these laws.
1200845139	11/7/2019	Insurance Career Training Inc., dba Producers Direct CE	The Regulation of Insurance	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Indiana. Discusses the history of insurance licensee regulation, McCarran-Ferguson Act, state regulation, the NAIC and Model Regulations, unfair trade practices, and the agent/agency relationship.

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1200845139	11/7/2019	Insurance Career Training Inc., dba Direct CE	Reinsurance	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Indiana. Discusses insurers and re-insurers, types of reinsurance, treaty versus facultative reinsurance, proportional versus excess of loss basis and the function and implementation of each.
1200845139	11/7/2019	Insurance Career Training Inc., dba Direct CE	Ethical Challenges and Consequences	Ethics	Ethics: 3	NAIC Uniform submission, 3 classroom credit hours approved by Indiana. Discusses breach of duty, unfair competition and unfair trade practices, agent claims and violations, legal versus administrative actions, dishonest versus negligent actions, misrepresentation and forgery.

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1200845139	11/7/2019	Insurance Career Training Inc., dba Direct CE	E&O Review & Case Studies	Property & Casualty	General: 6	NAIC Uniform submission, 6 classroom credit hours approved by Indiana. Discusses errors and omissions, actions and insurance policy coverage, insurance agent duties to the insured, types of errors and omissions claims, risk management for the agent and agency, reporting expectations, and negligence.
2343919981	11/7/2019	RegEd, Inc.	Ethics for Insurance Claims Adjusters	Adjuster	General: 3	NAIC Uniform submission, 3 computer-based, self study ethics credit hours approved by North Carolina. Discusses ethics principles, fiduciary duty to the client, company and agency, codes and cannons of ethics, independent, public and staff adjusters, ethical claim and adjusting procedures, workers" compensation losses, unfair claim settlement, deceptive practices and two case studies.

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297991512	11/8/2019	CEU Institute, Inc.	WIND 2020 Conference: Thur AM 10:30	Adjuster	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses appraisal certification, and hurricane losses.
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297991512	11/8/2019	CEU Institute, Inc.	WIND 2020 Conference: Thur AM 8:30	Adjuster	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses appraisal certification, hurricane damage technology and workflow processes.
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297991512	11/8/2019	CEU Institute, Inc.	WIND 2020 Conference: Thur AM	Ethics	Ethics: 2	The course addresses product knowledge of ethics. Discusses ethically handling and adjusting claims, legal perspectives an ramifications of claim actions.
297991512	11/8/2019	CEU Institute, Inc.	WIND 2020 Conference: Wed PM	Adjuster	General: 4	The course addresses product knowledge of property and casualty insurance. Discusses umpire certification, adjusters versus public adjusters, appraisal amounts in controversy, assignment of benefits, wind claim mediation, roof evaluation and losses, claim litigation, commercial policies, property insurance fraud and claim handling technology.

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297991512	11/8/2019	CEU Institute, Inc.	WIND 2020 Conference: Wed AM	Ethics: 1	The course addresses ethics. Discusses ethical claim navigation, the claim processes, claim investigation and claim resolution.
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297991512	11/8/2019	CEU Institute, Inc.	WIND 2020 Conference: Wed AM	Adjuster	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses umpire certification, Florida case law and legislative update, total loss and damage measurement, extra-contractual damages, legal language for adjusters, and post loss conditions.
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297991512	11/8/2019	CEU Institute, Inc.	WIND 2020 Conference: Tues PM	Adjuster	General: 4	The course addresses product knowledge of property and casualty insurance. Discusses appraisals and amounts in controversy, commercial policy claims, Gulf Coast claims, hurricane losses, hail and wind damages, temporary roof repair, and property insurance.
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297991512	11/8/2019	CEU Institute, Inc.	WIND 2020 Conference: Tues AM	Adjuster	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses commercial policies, post-loss conditions, and property insurance fraud.
798992970	11/8/2019	National Association of Insurance and Financial Advisors Montana	Understanding the Broadening Options for Extended and Long Term Care Planning	Long Term Care	General: 1	The course addresses product knowledge of life and disability insurance. Discusses extended and long-term care insurance, client issues, client health, planning options and uninsurable clients.

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2720882518	11/8/2019	Montana Insurance Education Foundation, Inc.	Flood Program Overview: NFIP Then and Now	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses the National Flood Insurance Program, the Flood Insurance Reform Act of 2004, community participation requirements, flood maps, coverage limits, eligible and ineligible property, policies, general rules and rating, claim handling and program assistance.
4042469792	11/8/2019	National Association of Insurance and Financial Advisors Montana	Ethics for Insurance and Financial Professionals: Questions for Consideration and Discussion - 2	Ethics	Ethics: 1	The course addresses ethics. Discusses social responsibility, ethical behavior and transparency, conflicts of interest and perceptions of insurance.

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2043735290	11/11/2019	National Business Institute, Inc.	Auto Injury Litigation From Start to Finish (Ethics)	Ethics	Ethics: 1	The course addresses ethics. Discusses conflict of interest prevention, client confidentiality, the work-product doctrine, and working with represented parties.
3346491656	11/11/2019	National Business Institute, Inc.	Auto Injury Litigation From Start to Finish	Property & Casualty	General: 5	The course addresses product knowledge of property and casualty insurance. Discusses reviewing the claim, interpreting the auto policy, damages and liens, subrogation, bad faith, settlement negotiations, and arbitration.

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1374495726	11/12/2019	DF Institute, dba Kaplan Financial	Agents and Ethics, 2nd Edition	Ethics	Ethics: 3	NAIC Uniform submission, 3 web-based, classroom credit hours approved by Illinois. Discusses ethics principles, responsibilities to the insurer and the insured, ethics and the law, and ethics in practice.
2336890575	11/12/2019	DF Institute, dba Kaplan Financial	Ethics for Insurance Professionals: A Practical Guide	Ethics	Ethics: 3	The course addresses ethics Discusses ethics principles, responsibilities to the insurer and the insured, agent responsibilities to the state, ethics and the law, and ethics in practice.

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2753749802	11/12/2019	DF Institute, dba Kaplan Financial	Beneficiary Designations - Getting it Right	Life	General: 4	NAIC Uniform submission, 4 web-based classroom credit hours approved by Illinois. Discusses the need for a beneficiary on financial accounts, passing property and monies at death, client intentions, annuity and retirement plan beneficiaries, and IRA beneficiaries.
3565509973	11/12/2019	Broker Educational Sales and Training, Inc	Guide to Retirement Planning Strategies	Life	General: 21	The course addresses product knowledge of life insurance and annuities. Discusses retirement plan definitions, retirement income needs, managing retirement income and sources, withdrawal rates, Social Security benefits, employer-sponsored plans, 401k and 457 plans, employer-sponsored (SEP) IRAs. Roth and

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3565509973	11/12/2019	Broker Educational Sales and Training, Inc	Ethics For The Insurance Producer	Ethics	Ethics: 5	The course addresses ethics. Discusses ethics definitions, ethics in the insurance industry, industry regulation, unfair trade practices, ethical dilemmas and codes of ethics.
3565509973	11/12/2019	Broker Educational Sales and Training, Inc	Advisors Guide to Medicare and Medicaid	Life	General: 12	The course addresses product knowledge of social insurance. Discusses Medicare, Parts A, B, C (Advantage plans), D (pharmacy benefits), Medicare supplement policies, Medicare reform, Medicaid, and Medicaid planning.
642183604	11/13/2019	DF Institute, dba Kaplan Financial	Understanding IRAs - Products, Distributions, and Strategies, 1st Edition, 2nd Revision	Life	General: 4	NAIC Uniform submission, 4 web-based classroom credit hours approved by Illinois. Discusses types of individual retirement accounts, the mechanics and function of plans, traditional versus Roth IRAs, distributions, rollovers and transfers.

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660103352	11/13/2019	DF Institute, dba Kaplan Financial	Financial Strategies to Achieve Life Client Objectives, 3rd Edition		General: 4	NAIC Uniform submission, 4 web-based, classroom credit hours approved by Illinois. Discusses financial planning processes, risk assessment and management, wealth accumulation,
815238647	11/13/2019	DF Institute, dba Kaplan Financial	Ethics and Insurance Fraud, 2nd Edition	Ethics	Ethics: 3	The course addresses ethics and management. Discusses elements of insurance fraud, types of insurance fraud, fraudulent claims, and recognizing insurance fraud opportunities.

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1520545127	11/13/2019	DF Institute, dba Kaplan Financial	Social Security: Now . . . and the Future? 2nd Edition, 4th Revision	Life	General: 4	NAIC Uniform submission, 4 web- based, classroom credit hours approved by Illinois. Discusses social insurance, eligibility and benefits, disability, retirement and survivor benefits, and benefit taxation.
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1744318826	11/13/2019	DF Institute, dba Kaplan Financial	Cyber Risk Insurance, 2nd Ed	Property & Casualty	General: 2	The course addresses product knowledge of casualty insurance. Discusses business risk management, commercial policy coverages, cyber risk policy coverages, data breach, privacy and business interruption coverages.
2213142686	11/13/2019	DF Institute, dba Kaplan Financial	Understanding Disability Income Insurance, 2nd Ed, 3 hour	Life	General: 3	NAIC Uniform submission, 3 web-based, classroom credit hours approved by Illinois. Discusses the concept of disability, disability losses, protection from the loss, individual, social and group disability plans, underwriting, business disability income, key person and disability buy-sell plans.

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2700696045	11/13/2019	ClieTell CE	Suitability & Ethics of Client Recommendations	Ethics	Ethics: 3	NAIC Uniform submission, 3 classroom credit hours approved by California. Discusses suitability determination, federal, securities and insurance regulation of annuities, client best interest standard, life insurance and annuity replacement and FINRA rules.
3045597799	11/13/2019	DF Institute, dba Kaplan Financial	Managing and Insuring the Cyber Risk	Property & Casualty	General: 2	NAIC Uniform submission, 2 web-based classroom credit hours approved by Illinois. Discusses business risk management, commercial policy coverages, cyber risk policy coverages, data breach, privacy and business interruption coverages.

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3273879237	11/13/2019	DF Institute, dba Kaplan Financial	Understanding Indexed Annuity and Life Insurance Contracts	Life	General: 4	NAIC Uniform submission, 4 web-based, classroom credit hours approved by Illinois. Discusses fixed indexed annuities and fixed indexed life insurance policies, suitability and marketing practices.
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